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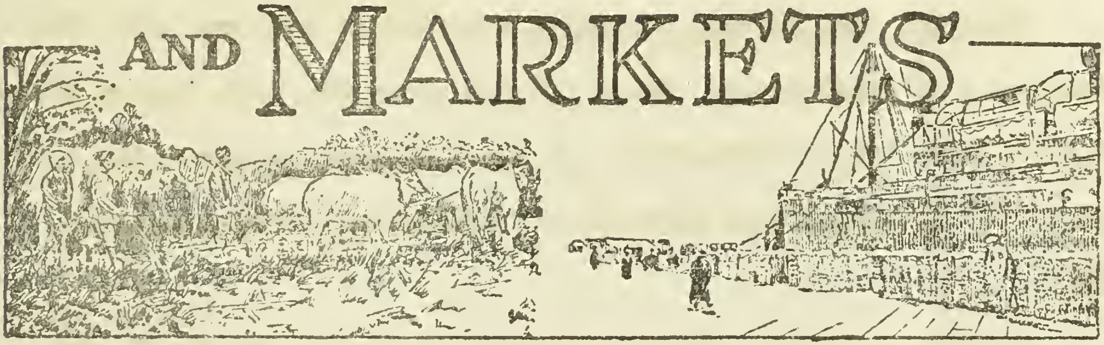
FOREIGN CROPS AND MARKETS



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R B CRAVEN
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FEATURE ARTICLE

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE

Reprint

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LATE CABLES

Scotland 1935 acreage estimates reported as follows, with 1934 comparisons in parentheses: Wheat 101,000 acres (98,000), barley 77,000 (96,000), oats 826,000 (816,000), rye 2,000 (3,000), potatoes 132,000 (140,000). (International Institute of Agriculture, Rome, August 1, 1935.)

Irish Free State preliminary acreage estimates for 1935, compared with 1934 figures in parentheses, placed as follows: Oats 619,000 acres (583,000), barley 136,000 (143,000), potatoes 338,000 (343,000). International Institute of Agriculture, Rome, July 30, 1935.)

Scotland livestock numbers on June 4, 1935 reported as follows with 1934 comparisons in parentheses: Horses 147,000 (148,000), cattle 1,316,000 (1,306,000), sheep 7,755,000 (7,673,000), hogs 255,000 (200,000) of which breeding sows 32,000 (27,000). (Agricultural Attaché E. A. Foley, London, August 1, 1935.)

Irish Free State livestock numbers on June 1, 1935 estimated as follows with 1934 comparisons in parentheses: Cattle 4,002,000 (4,086,000), sheep 2,999,000 (2,931,000), hogs 1,107,000 (968,000) of which breeding sows 117,000 (103,000). (Agricultural Attaché E. A. Foley, London, July 30, 1935.)

CROP AND MARKET PROSPECTS

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BREAD GRAINS

Summary of recent information

The first official estimate of the 1935 wheat crop in Greece, as reported by the International Institute of Agriculture at Rome, is placed at 30,864,000 bushels. This indicates a record crop, with an increase of 7 percent over the 1934 harvest and a gain of 62 percent over the average crop of the past five years. The rye crop is estimated at 3,031,000 bushels as compared with 2,909,000 bushels produced in 1934. Estimates of the 1935 grain production of Switzerland also point to a record wheat crop this year, and rye production may exceed that of 1934 by 11 percent. The wheat figure, 5,879,000 bushels, compares with 5,071,000 bushels harvested in 1934. Rye is placed at 1,378,000 bushels as against the 1934 crop of 1,242,000 bushels.

Prospects in North Manchuria point toward an excellent wheat harvest this season, according to radioed information received from Consul General Adams at Harbin through the Shanghai office of the Foreign Agricultural Service. Weather conditions continue to be favorable in the important producing areas, although heavy rains caused some damage in eastern parts of North Manchuria and in South Manchuria. Unofficial estimates place production about 30 percent above that of 1934, when Manchuria harvested about 24,000,000 bushels of wheat, 21,117,000 bushels of which were produced in North Manchuria.

Canadian crop conditions

Weather conditions in Canada during the month of July were fatal to the good crop prospects of the southern plains, and rust has severely reduced the yields of all bread wheats in Manitoba, according to a telegram from the Dominion Bureau of Statistics at Ottawa. Furthermore, the infection of rust is spreading westward into Saskatchewan, while the drought area, which has been limited to rather narrow belts along the Alberta-Saskatachewan boundary, is extending eastward. As the harvesting of the main wheat crop will not be general in this aroa for two or three weeks, prospects are very indefinite and unsatisfactory. A light harvest is expected in southern and parts of central Alberta, but good prospects prevail in other sections of the province. The heat wave which British Columbia has experienced for some time was mostly beneficial to crop growth, but rains are now needed. Recent weather conditions in the Maritime Provinces and eastern Canada also favored crop growth, but showers interfered to some extent with the harvesting of hay.

CROP AND MARKET PROSPECTS, CONT'D

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The Shanghai wheat market

Influenced by higher quotations on foreign wheat and a better flour demand, the Shanghai wheat and flour market advanced during the week ended July 27, according to a radiogram from the Shanghai office of the Foreign Agricultural Service. As the mills had enough wheat on hand to last for two months, they were not interested in foreign wheat at the prices prevailing. Arrivals of domestic wheat at Shanghai continued in moderate volume but remained below last year, while at Tientsin and Tsingtao they were reported much below 1934. Most of the Shanghai mills were running at full capacity, but about 10 percent had closed on account of financial difficulties. Flour demand was fairly strong from North China and showed some increase from the Yangtze Valley.

Wheat prices, c.i.f. Shanghai duty included, for August shipment, were quoted as follows: Australian (New South Wales) 82 cents per bushel, Argentine 83 cents, domestic standard 74 cents. Domestic flour for August and September delivery was 92 cents per bag of 49 pounds; Australian flour, c.i.f. Hongkong, $3.06 per barrel of 196 pounds. Imports of wheat into China for the 1934-35 marketing year totaled 17,440,000 bushels, of which 71 percent came from Australia. In 1933-34, wheat imports amounted to 19,913,000 bushels, and in the new season, 1935-36, they are expected to approximate 22,000,000 bushels. Imports of flour into China during 1934-35 were reported at 746,000 barrels as compared with 713,000 barrels imported in 1933-34, while estimated takings in 1935-36 are placed at 544,000 barrels.

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FEED GRAINS

Summary of recent feed grain information

There have been few changes in the estimates of feed grain production during the past week. The 1935 barley production in 15 countries so far reported, which in 1934 accounted for about 52 percent of the estimated Northern Hemisphere total, exclusive of the U.S.S.R. and China, amounts to 881,203,000 bushels, an increase of 20 percent over the production in the same countries last year.

The first estimate of the barley crop in Rumania is 50,522,000 bushels, which is about 26 percent larger than the small harvest of 1934, but is 31 percent below the average production of the past five years. The production in Greece is placed at 10,518,000 bushels, which is 7 percent more than the 1934 harvest, and 19 percent above the 1930-1934 average. The total barley production in the European countries reported, however, is nearly 4 percent below that of 1934.

CROP AND MARKET PROSPECTS, CONT'D

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The 1935 oats production in 11 countries reported, which last year raised 69 percent of the Northern Hemisphere harvest, exclusive of the U.S.S.R. and China, totals 1,787,396,000 bushels, an increase of 69 percent over that of the same countries a year earlier.

The first estimate of the oats crop in Rumania is 46,503,000 bushels, which is 20 percent above the harvest of last year, but is 12 percent below the 1930-1934 average. The crop in Greece is estimated at 8,818,000 bushels, which is 20 percent larger than the 1934 harvest, and 27 percent above the average production during the past five years. The total oats production in the European countries reported this year is slightly below that of 1934.

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COTTON

Japanese cotton textile situation

Raw cotton imports into Japan during June increased in comparison with those of May, according to information received from the Shanghai office of the Foreign Agricultural Service, quoting Consul Howard Donovan at Kobe. Imports of cotton were as follows: Indian 158,241 bales, American 76,273, Egyptian 8,132, Chinese 2,077, Peruvian 3,632, Korean 266, African 47, and from all other cotton-growing countries 3,323 bales. This represents a total of 251,991 bales, or an increase of 52,335 bales over the May imports. The total American imports for the period September through June were 1,402,000 bales, as against 1,714,000 bales for the similar period a year earlier.

There were practically no new forward sales of American cotton during June. This was largely due to the fact that spinners expect lower prices in connection with the uncertainty regarding the financing of the new crop. The present forward purchases of American cotton amount to about 40,000 bales, as against 175,000 to 200,000 bales at this time last year. By the end of June American cotton stocks on hand consisted of 222,000 bales, while those of Indian cotton were 274,400 bales. The average price of American cotton from June 10 to June 30 was 14.12 cents per pound, while that of Indian was 11.04. The prices for the similar period during the month of May stood at 13.88 cents and 11.32 cents, respectively.

The total yarn production in Japan during the period January through June 1935 was 1,822,760 bales, showing an increase of 10 percent over the total produced during the first half of 1934. However, this figure is hardly one percent larger than during the second half of 1934. Yarn production during the second half of 1935 is expected to decline. Spinners

CROP AND MARKET PROSPECTS, CONT'D

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were sold out in yarn to the middle of August and in place goods to about July 25. During June spinners sold about 60 to 65 percent of their yarn output, while during the same period they were able to dispose of only 40 percent of the piece goods output. During the first half of 1935 yarn imports declined to 7,973 bales in comparison with 30,300 bales during a similar period of 1934. Yarn exports in June totaled 7,894 bales as against 18,160 bales in May.

Piece goods exports in June were 200,581,000 square yards, showing a sharp decline in comparison with May exports of 235,147,000 square yards. The prospects for the remainder of the year are poor. Large stocks of piece goods were shipped abroad during the past few months, but recent demand has been very poor. Large piece-goods merchants and spinners have anticipated smaller demand and have kept their stocks as low as possible. The smaller producers, however, have made fairly large yarn purchases and for this reason by the end of June they had on hand large stocks of finished goods which they were selling at losses. In view of this situation, in some lines finished cloth was selling at less than yarn cost. It is expected that the small producers will reduce their output by 20 percent, a measure which will result in a reduction in consumption of 20,000 to 30,000 bales of yarn per month. On June 30 the unsold stocks of piece goods in public warehouses were 158,000 bales of 20 to 40 pieces each. This is the largest amount of stock on hand in recent years. It is difficult to determine the amount of piece goods held by spinners and weavers in their plants.

Japanese textiles circles are of the opinion that the cotton piece goods export trade has attained its highest level and that gradual recession will take place due to tariff barriers and quotas imposed by importing countries. Of such countries Peru and Egypt were the most notable examples during July. On July 20 Peru announced that Japan had filled its quota of 200 tons of piece goods for the six months' period June through November, and that no shipments would be permitted until December 1, 1935. On July 21 Egypt announced that on October 18, 1935, the Japanese-Egyptian trade convention would be abrogated. This was a severe blow to the Japanese piece goods trade since Egypt is the fourth largest consumer of Japanese piece goods.

During the first four months of 1935 the Japanese cotton textile exports to 16 countries showed declines ranging from 99 to 4 percent in comparison with the same period of 1934. The 8 countries showing the greatest percentages of decrease were San Salvador, Jamaica, Caylon, Nigeria, Greece, Panama, Mexico, and Egypt, in order named.

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CROP AND MARKET PROSPECTS, CONT'D

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HOPS

European hop crops variable

A report just received from Gordon P. Boals, Assistant Agricultural Attaché in Berlin, contains the following comments on the prospective European hop crop.

The hop plants in most important producing districts were held back in growth during much of the spring by very cool and unseasonable weather. In June, however, with favorable weather conditions, growth was quite rapid and the plants are now reported almost normal compared with other seasons. The situation in the important German districts is considered quite satisfactory at the present time. Insect damage appears to have been very limited and plant diseases, which frequently cause much damage, have not been the occasion of any special concern thus far and are being combatted as usual by spraying. If weather conditions continue favorable, the 1935 crop in Germany should have average acreage yields at least and thus be somewhat above last year's crop which was reduced considerably in the important Hallertau area by the drought.

In Czechoslovakia, reports of considerable deterioration are being received at present from the important Saaz district. The weather has been very dry and with the late spring the plants are not reported in good condition at present. Unless very favorable conditions prevail from now on, a reduction in the crop there from last year and from average yields would seem probable. The other producing districts in Czechoslovakia report quite satisfactory conditions at present, but they are of much less importance than the Saaz region.

Generally satisfactory conditions are reported for hops in Yugoslavia, Poland, France, and Belgium. Growth is 1 to 2 weeks late in many places but the plants now appear to be progressing quite well.

It is still too early to make reliable estimates of the crops, but within the next few weeks the plants will have developed to such an extent that the preliminary estimates will be available for some countries.

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CROP AND MARKET PROSPECTS, CONT'D

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FRUIT, VEGETABLES, AND NUTS

Canadian apple crop above 1934

The 1935 Canadian commercial apple crop is placed at about 12,135,000 bushels, according to a telegram received in the Foreign Agricultural Service July 30, from the Fruit Branch of the Canadian Department of Agriculture. This figure is slightly above the 11,700,000 bushels produced in 1934, and above the average production of the last decade. The boxed apple crop in British Columbia is estimated at 4,872,000 bushel boxes, or about the same as last year. The crop in eastern Canada is around 7,263,000 bushels. Barrels are generally used in the latter area.

Judging by the size of the crop, Canada should have an export surplus of 6,000,000 bushels, most of which will no doubt go to the United Kingdom where Canadian apples enter duty-free. Total exports from Canada in 1934-35 amounted to around 5,700,000 bushels.

World fig crop smaller

Exports of figs during the 1935-36 season from Turkey and Greece, are not likely to be as heavy as the 44,650 short tons exported in 1934-35 (August-July), according to a report received in the Foreign Agricultural Service from L. D. Mallory, Assistant Agricultural Attaché at Paris.

Early season prospects in Turkey indicate a smaller fig production than the large crop of 1934, but, nevertheless, a relatively good production is expected. In Greece the crop appears to be better than in 1934, when the crop was small. The quality is promising and with the advanced season, the first exports may be made early in August. These two countries are the most important exporters of quality figs. There is a considerable production in other Mediterranean countries but quality is generally lower and most of the crops are consumed locally.

Exports from Turkey during the past season are estimated to have reached 28,000 short tons, or somewhat more than the 26,290 short tons of 1933-34. About 16,650 short tons moved out of Greece during the year compared with 18,338 the preceding season. If good weather continues in the latter country, the supplies for export this season may equal the heavy exports of the 1932-33 season when shipments exceeded 21,000 tons.

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BREAD GRAIN PRODUCTION AND TRADE IN FRANCE a/

Wheat is the chief crop of France and is the grain mainly used in the production of bread for common consumption. France has one of the world's highest figures for per capita consumption of bread. The country has a population of over 42,000,000 people, living on an area of 207,054 square miles, a region about 50,000 square miles smaller than Texas. The harvested wheat area in the years 1929-1933 averaged 13,109,000 acres, a small increase over the average for the preceding 5 years, but a decline of about 19 percent below the 1909-1913 average. The 1929-1933 production figure of 305,066,000 bushels, however, indicated an increase of slightly less than 9 percent over the 1924-1928 average, and of 6 percent over the prewar average. The yield per acre in 1929-1933 averaged slightly more than 9 percent over that of the preceding 5 years, and was 11 percent above the prewar average. In 1934, 338,513,000 bushels were produced on 13,354,000 acres. See table, page 150.

Rye also is used in France for bread making to some extent, but only in a very few sections of the country is its use for that purpose of any significance. Rye production in the years 1929-1933 averaged 32,717,000 bushels, representing a reduction of nearly 38 percent from the 1909-1913 average. The harvested acreage shows a reduction approximating nearly 42 percent, while the yield per acre shows an increase of nearly 8 percent. The 1934 rye area was placed at 1,694,000 acres, yielding a crop of 32,983,000 bushels. See table, page 151.

Imports and exports

Under normal conditions the importation of wheat and flour into France is not confined to the quantity needed to make up any deficiency in production that might occur, but amounts to considerably more. The reason for this is that French wheats are deficient in baking strength. To produce bread flour of satisfactory quality, milling mixtures must contain some foreign wheat of strong quality. In addition to the foreign wheat needed for the production of bread flour, a considerable quantity of durum wheat must be imported for the production of semolina for macaroni and other alimentary pastes. French wheat is entirely unsuited for this purpose; consequently, only foreign or colonial wheats are used. The foreign wheat needed for these purposes is imported almost exclusively in the form of grain rather than flour.

During the period 1909-1913 annual imports of wheat and wheat flour (this latter in terms of grain) averaged about 45,000,000 bushels, which represented approximately one eighth of the total of these commodities utilized in France. (See table, page 150.) Annual imports of wheat and flour during the period 1924-1928 averaged approximately 47,500,000 bushels and during the period 1929-1933 approximately 55,500,000 bushels, or an increase of 8,000,000 bushels over the preceding period. This is a

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a/ Prepared by J. H. Shollenberger, Grain Specialist, Foreign Agricultural Service. Based on studies made in Europe.

considerable increase and is hard to justify, especially since the average annual domestic production of wheat between these two latter periods had increased about 25,000,000 bushels. If, however, annual import statistics are studied it will be seen that during the last two years of the 1929-1933 period imports decreased greatly. This decrease was the result of the drastic restrictions placed on wheat and flour imports from foreign countries.

Whatever may have been the cause for the increase in imports, it is certain that it was not entirely due to increased consumption, because, during the latter part of the 1929-1933 period domestic stocks a/ of wheat increased at an inordinate rate.

Formerly the excess in wheat imports over the actual quantity required to meet any deficit occurring in domestic production was balanced by exports of domestic wheat and flour. In recent years, however, because of the over-supply of wheat in many parts of the world it became difficult to find a foreign market for French wheat and flour and as a consequence, stocks of domestic wheat accumulated to such an extent that there was a virtual prohibition of the importation of foreign wheat and flour for domestic consumptive purposes.

France's foreign trade in rye is of slight importance compared with that in wheat. This trade consists of both imports and exports, with the former almost always exceeding the latter. There is a wide variation in this trade from year to year, ranging in the case of imports from almost zero up to 10,000,000 bushels and in the case of exports from zero up to slightly more than 1,000,000 bushels.

Domestic wheats

French wheats are predominantly of winter habit, red color, and soft texture. They are of the soft red winter type and are generally of weak quality. None is of distinctly hard texture or strong quality. Very little spring wheat is produced. The wheats of northern France are usually considered to be superior in quality to those produced in the southern part of the country.

The usual moisture content of wheats grown in northern France is 15 to 16 percent and in southern France 14 to 15 percent. This, of course,

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a/ It is estimated that 650,000 metric tons (23,883,000 bushels) is a normal wheat crop carryover for France. The carryover from the 1932 crop was about 1,800,000 to 2,000,000 metric tons (66,138,000 to 73,487,000 bushels) and from the 1933 crop more than 3,000,000 metric tons (100,230,000 bushels).

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D

varies from season to season, depending upon weather conditions at the time of harvest. Owing to unusually dry weather during the harvest seasons of 1932, 1933, and 1934, the moisture content of the wheat of these crops averaged somewhat lower than that for the general run of the wheat crops.

The protein content of French wheats is generally low, probably averaging not more than 8 percent on the basis of a 13.5 percent moisture content. In both quantity and quality of gluten the 1932, 1933, and 1934 crops were above the average of preceding years.

Garlic is found in some French wheat, but seldom to any very appreciable extent. Weed seeds are present in the grain to some extent, but on the average not in percentages as high as in United States Soft Red Winter wheats. In hilly sections of the country where the ground is stony the wheat when marketed usually contains small stones. The average hectoliter weights reported for the crops from 1909 to 1933 are shown on page 151.

On the larger farms the wheat is cut with a binder. The cut grain is then put in shocks the same as in America. When the shocked grain becomes sufficiently dry to store safely, it is stacked in the field, usually without any covering other than that afforded by the straw itself. Among the peasant class of farmers, whose farms are generally quite small, hand methods of harvesting are used. As a general practice these farmers store their grain crop in barns instead of stacking it in the field. Their crops are small, however, and do not require much space for storage.

After the close of the World War, in order to restore the country's prewar wheat production capacity, the growing of high yielding varieties was encouraged. Recently, however, there has been a change of policy in this regard with the result that the government is now concerning itself with the introduction of varieties of good quality. The milling industry has been demanding this change for some time. But Millers are not inclined to buy domestic wheats on a quality basis and therefore it is not probable that much progress can be made in this direction unless the better quality varieties advocated are of a yielding capacity equal to the varieties of low quality. Moreover, climatic conditions are not conducive to the production of wheat of such outstanding quality as to warrant much price differentiation.

According to an official catalog of wheat varieties published under date of September 15, 1933, there were at that time approximately 600 different wheat varieties grown in France. The large number indicates very little standardization in the selection and distribution of seed. According to a commercial miller of wide experience, more care is exercised in the selection of seed wheat in northern France than in southern France.

This he attributes to the larger size of the farms in the north and to the greater progressiveness of the farmers in that part of the country.

Although it is probable that France may not be able to improve the quality of wheat production to completely satisfy requirements for high quality or special types of wheat, it is quite possible that production of wheat in the colonies may be improved within a comparatively few years to such an extent that a large portion of these requirements can be taken care of from this source. Some wheat of excellent quality is already arriving from certain of the colonies, and with the crop improvement work that is under way there, it is very probable that the quantity of high quality wheat from this source will increase rapidly. The possibilities of improvement in quality in colonial wheats more particularly apply to durum wheats for use in the manufacture of semolina than to bread wheats, but even in the case of the latter considerable improvement in quality may be effected in the near future.

Government regulations affecting the milling and grain trades

For a long time France has followed the policy of protecting and aiding wheat farmers. This policy has had two main objectives, namely, to make the farmer more prosperous, and to stimulate production of this grain to a self-sufficiency basis. The means employed to accomplish these objectives have included such supplementary devices or measures as import duties, import quotas or contingents, import licenses, milling and mixing regulations, export subsidies and price fixing, production and mill processing taxes, and restrictions on production. See table on page 152 for limitations on the use of domestic and foreign wheats in the production of bread flour and semolina since December 5, 1929, and page 153 for limitation of flour extraction percentages. Two other devices or measures affecting the milling and grain trades which should be mentioned here are one dealing with the "admission temporaire" import privilege and another with the denaturing of wheat to increase consumption. a/

All of these measures or devices have not been applied at one time, but were put in operation at various times over a period of several years. At first the chief concern of the government was to stimulate domestic wheat production and to support the domestic wheat market in order to make wheat farming profitable. During recent years, however, the accumulation of unusually large stocks of domestic wheat as the result of a succession of several large domestic crops and of a depressed world market has necessitated a reversal of the policy on production so that now instead of encouraging production further increases are actually being prohibited.

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a/ For additional details, see "Foreign Crops and Markets" for September 24, 1934, and February 18, 1935.

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D

Milling practices

According to official statistics published in 1931, the number of mills in France was as follows:

Roller mills	5,482
Stone-buhr mills	2,459
Small wind and/or water-power mills	10,444
Total	18,385

Most of the mills in the two groups, "stone buhr mills" and "small wind and/or water-power mills," are probably of an obsolete character. Most of them, no doubt, operate only on a strictly custom or grist-grinding basis and probably none of the mills in these two groups is very important from the standpoint of production. All the important commercial mills are probably included in the roller-mill group, and it is with these that the following discussion is concerned. There are some very large and well-equipped mills in France, as modern as any to be found in other countries. There are, on the other hand, many French roller mills, some quite large which are very poorly equipped. Some of the latter, which were visited by the writer, are equipped with machinery of a period dating back to the time when the roller process of milling was inaugurated.

The system of milling used in France is less standardized than in most other European countries or in the United States. No system is used that can be said to be typically French. Some mills use the English system and some the German system, while others use systems which are a mixture of the systems employed in other countries.

The important milling centers of France are at Marseille, Paris, Le Havre, and Strasbourg. The largest mills are located at Paris and Strasbourg. It is reported that the mills of Marseille have a total grinding capacity of 1,600 metric tons (59,000 bushels) of bread wheat and 1,000 metric tons (37,000 bushels) of durum wheat per 24 hours.

All mills that have used foreign wheats in years past are equipped with wheat washers, conditioners, and a sufficient assortment of cleaning devices for removing most any kind of foreign matter that may be found in wheat. The large mills have mill laboratories, a few of which are up-to-date, but as a general rule, laboratories are not so much used in French mills or so well equipped as those in England, Germany, Sweden, and a few other European countries. Gluten tests by the Chopin Extensimeter method and moisture and ash determinations constitute the principal work of these laboratories. Protein content is given practically no attention by the French miller. Ash content has become important only because of its

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D.

inclusion in recent years in government specifications for domestic and export flours. The Pekar test is also used by the government for determining the quality of flour. Im making the Pekar test a certain quality of pyrocat etchine is mixed with the water in which the flour is immersed. The presence of this material in the water has a coloring effect on the impurities present in the flour, tending to make them stand out more prominently.

It is claimed that flour extraction percentages before the World War were about equivalent to the kilogram-per-hectoliter weight of the wheat milled. After the war, until limited by governmental decree, the extraction percentage tended slightly downward to a figure approximately 2 points less than the kilogram-per-hectoliter weight of the wheat.

It is said that flours marketed in France may not have so high a moisture content as those marketed in England since flour does not go into consumption so soon after milling in France as in England. One French miller interviewed stated that the moisture content of flour for French consumption should not exceed 14.5 percent in the summer and 15.5 percent in the winter.

One miller stated that the storage capacity at most interior mills was equivalent to 5 to 6 weeks' supply of wheat but that the storage capacity at the port mills was generally somewhat larger. Under normal conditions the stocks of wheat usually carried represent about three fourths of the storage capapcity. Millers who grind only domestic wheat make a practice of carrying a stock of old wheat over into the new crop year for blending with the new wheat. This practice is not followed by millers who use foreign wheat in their milling mixtures.

As a general rule the French baking trade does not require a strong flour. In most sections of France flours of relatively weak quality are deemed satisfactory but in Alsace-Lorraine, the Rhone River Valley, along the Mediterranean coast line, and in the Atlantic seaport towns fairly strong flours are demanded. A wheat mixture consisting of 70 percent domestic wheat and 30 percent United States Hard Red Winter is generally considered suitable for the production of French flour. If, however, the percentage of foreign wheat used is between 30 and 15 percent it is considered necessary to include some foreign wheat of stronger baking characteristics, and if less than 15 percent of foreign wheat is used, all of it must be of the best quality. The types of foreign bread wheats best suited for French milling requirements are United States, Canadian, and Russian hard wheats. Argentine and Danubian wheats, except those of the very best quality, are not so suitable. Australian wheats are generally too weak to be useful in French milling mixtures.

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D.

In the production of semolina for macaroni purposes Canadian durum wheat is given first preference and United States Amber durum second. North African durum wheats, because of their variable quality and mixture of types, are not considered very desirable. Present government regulations, however, require their use by French durum wheat mills almost to the entire exclusion of other durum wheats. The milling of durum wheat in France is chiefly confined to the Mediterranean coast district. Marseille is the chief milling center for the production of durum wheat semolina.

The bleaching or treating of flour by use of chemicals was prohibited in France about 1933. It is reported that this action was taken because such practices were considered harmful to the health of the people.

Baking practices

Practically all of the bread consumed in France is baked in commercial bakeries. Home baking is practiced only in out-of-the-way country locations.

According to a statement made by an official of the French Milling School, there are only 5 or 6 modern bakeries of the factory type in France. One of these, the Grand Boulangerie de la Seine, in Paris, has a production capacity of 30,000 kilograms of bread per day. Another one of about the same capacity located in Paris is operated by the Government for the production of bread for use in government-supported institutions in the Paris district.

Most of the bread and other bakery goods consumed in France is produced in small bakeries of which there are said to be approximately 45,000 throughout the whole country, 3,600 of them being in the Paris district. The French consumer demands strictly fresh bread with his meals and particularly for breakfast. This requirement can be met only when the bakery is quite near to the consumer; it constitutes a serious handicap to the factory type of bakery which, because of its wholesale production, must market its product over a relatively large area. A further handicap to the large bakery is the governmental restriction on night work which, although applying to all bakeries alike, does not affect the small bakery so much as the large bakery because of the direct relationship of time to distance in the matter of service to the customer.

It is a common practice in many rural sections of France for bakers to exchange bread for wheat with farmers. Some bakers give as much as 65 kilograms of bread for 80 kilograms of wheat.

Nearly all of the bread produced in France is hearth baked. Very little of it is of the pan loaf type. The hearth baked loaves are either of the long slender style or of the round flat or ham-shaped style. The

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D

latter is common in some parts of France but the slender loaf is the more general style, especially where fresh breads are easily obtainable. The French people like a crusty bread and the long slender style of loaf fulfills this requirement very satisfactorily. This style of bread varies in length from a few inches up to 39 inches (1 meter) and is seldom much thicker than a man's wrist. The meter-length loaves are generally of 700 grams weight.

A coarse porous texture is desired for French bread. The cellular structure should be harsh or firm rather than spongy. A grayish, creamy color of crumb is preferred; whiteness is not especially desirable. The crust must be thick and crisp but not hard and must be of a dark brown color and of glossy appearance. Much of the present production of bread falls somewhat short of these qualifications; in fact, some of it is quite poor in quality.

As a general rule the price of flour is of more concern to the baker than its quality. He likes to buy his flour on a long-term contract basis and usually gets only one kind of flour at a time. Unlike the German baker he is not inclined to mix or blend flours of different kinds. He feels that he can adjust his method of baking to produce the desired results from most any flour, providing he is given an opportunity to make a trial baking. Some bakers contend that the restrictions on imports of foreign wheat have not lowered the quality of their products. They do admit, however, that they have had to alter their method of baking considerably and have had some difficulty in the production of bread of the quality desired. Except in the higher class bake-shops the baker uses the same kind of flour for pastries as he does for bread. In shops where this is not the practice a stronger and higher grade flour is demanded for pastries than for bread.

Although relatively weak flours are suitable for bread-making purposes in most of France, some sections, namely Alsace-Lorraine, the Rhone River Valley, and the Mediterranean coast area, require a relatively strong flour. Pastry and cake making in France is a higly developed art and the consumption of these products is relatively large. The cakes are generally of the spongy and confection type. The pastries are of a flaky crumb type. Cakes of the tea biscuit type are also used quite extensively.

Ordinary French bread consists only of flour, water, salt, yeast, and in some cases, malt. In some of the smaller cities and in rural districts sour dough instead of yeast is sometimes used. Where yeast is used the straight dough method of baking is generally employed. The formula used is about as follows:

Flour - 100 kilograms
Water - approximately 60 kilograms
Salt - 1.8 kilograms
Yeast - 1.0 kilograms

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D

These ingredients are mixed 20 minutes then allowed to ferment 3 hours after which the dough is divided into loaf sizes and proofed for about 40 minutes. The baking is done at a temperature of about 250 degrees centigrade and takes approximately 30 minutes for loaves of ordinary size.

According to law the authority to fix bread prices is conferred on the prefects of the various administrative regions or departments. In actual practice, however, bread prices are generally fixed by a council or committee on which the milling and baking industries, the consumers, and the government are represented. Each district or department has its own price-fixing council. Prices are fixed for fancy as well as common breads.

The schedule of bread prices prevailing in Paris and the Seine Department on March 11, 1934, was as follows:

Retail prices for ordinary bread

Weight	
250 grams	0.50 franc
500 "	1.00 "
750 "	1.50 "
1,000 "	2.00 "
Rolls or crescents	0.30 " each

Retail prices for fancy bread

Long rolled loaf bread (700 grams)	2.00 francs
Short loaf bread (300 grams)	1.00 "
Bread sticks (300 grams)	1.05 "
Bread sticks (100 grams)	0.55 "

If the size of the rolled bread (of 700 grams) is extended to 1.10 meteres the price is increased by 10 centimes. In case of delivery to the home the above prices are increased by 10 centimes.

Besides bread, pastries, and cakes there is another class of food products derived from wheat which is quite extensively used in France. This class includes noodles, macaroni, and similar pastes. Except in the case of noodles, the chief area of consumption for these products is in the section of France bordering the Mediterranean Sea. According to a statement by a high official of a French semolina millers' trade organization the annual consumption of macaroni and similar pastes has declined very materially since 1930. The cause of this decline he attributed chiefly to the quality deterioration of these products resulting from the restrictions placed on the importation of durum wheat from foreign countries. The quality of most of the durum wheat obtained from the French North African colonies, almost the sole source of supply for French durum wheat millers since the middle of 1932, is not generally suitable for the production of high quality macaroni.

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D.

WHEAT: Acreage, production, yield, trade, and amount available for consumption in France, averages, 1909-1913, 1924-1933, annual 1929-1934

Year	Acreage			Production	Yield per acre
	Winter	Spring	Total		
	1,000 acres	1,000 acres	1,000 acres	1,000 bushels	Bushels
Average:					
1909-1913.	–	–	16,500	325,644	19.7
1924-1928.	12,801	496	13,297	280,140	21.1
1929-1933.	a/ 12,744	a/ 497	13,277	305,066	23.0
Annual:					
1929......	12,956	380	13,336	337,252	25.3
1930......	12,765	515	13,280	228,105	17.2
1931......	11,725	1,115	12,840	264,117	20.6
1932......	13,145	283	13,428	333,524	24.8
1933......	a/ 13,130	a/ 191	13,503	362,330	26.8
1934......	a/ 12,863	a/ 339	13,354	338,513	25.3

Year	Imports b/		Exports b/		Apparent utilization c/	
	Wheat	Flour d/	Wheat	Flour d/	Total	Per capita
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Average:						
1909-1913.	44,264	558	49	1,154	369,263	9.3
1924-1928.	47,160	483	233	855	326,695	8.0
1929-1933.	54,233	1,203	3,753	11,010	345,729	8.3
Annual:						
1929......	37,634	837	10,649	7,406		
1930......	65,609	1,320	5,809	16,336		
1931......	92,691	620	14	12,535		
1932......	46,860	1,121	82	9,022		
1933......	28,322	2,115	2,213	9,751		
1934......	–	–	–	–		

Compiled by the Foreign Agricultural Service Division from official records and publications of the International Institute of Agriculture.

a/ Sown acreage; winter and spring do not add to total, which is harvested acreage.

b/ Year beginning August 1 for 1909-1913; July 1 for others.

c/ Stocks at the beginning and end of periods are disregarded.

d/ Converted to grain on basis of 4.5 bushels of grain per barrel of flour.

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D

RYE: Acreage, production, yield, trade, and amount available for consumption in France, averages 1909-1913, 1924-1933, annual 1929-1934

Year	Acreage	Production	Yield per acre	Imports a/	Exports a/	Apparent utilization b/	
						Total	Per capita
	1,000 acres	1,000 bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	Bushels
Average:							
1909-1913.	3,095	52,501	17.0	3,329	20	55,810	1.4
1924-1928.	2,024	36,403	18.0	1,708	124	37,987	.9
1929-1933.	1,781	32,717	18.4	1,869	7	34,579	.8
Annual:							
1929......	1,837	36,463	19.8	439	12		
1930......	1,846	28,393	15.4	4,286	19		
1931......	1,782	29,518	16.6	3,333	1		
1932......	1,732	33,876	19.6	1,068	1		
1933......	1,706	35,337	20.7	219	1		
1934......	1,694	32,983	19.5	-	-		

Compiled by the Foreign Agricultural Service Division from official records and publications of the International Institute of Agriculture.

a/ Year beginning July 1, except 1909-1913, which begin August 1; flour included, converted on the basis of 6 bushels of grain per barrel of flour.

b/ Stocks at beginning and end of periods are disregarded.

WHEAT: Average natural weight per hectoliter in France, 1909-1933

Year	Average natural weight per hectoliter	Year	Average natural weight per hectoliter
	Kilograms		Kilograms
1909..............	77.88	1922..................	76.90
1910..............	75.79	1923..................	77.50
1911..............	78.99	1924..................	75.35
1912..............	76.78	1925..................	75.78
1913..............	76.83	1926..................	75.44
1914..............	77.26	1927..................	74.36
1915..............	76.42	1928..................	76.91
1916..............	76.66	1929..................	76.97
1917..............	75.29	1930..................	71.66
1918..............	78.07	1931..................	73.46
1919..............	77.27	1932..................	75.33
1920..............	75.60	1933..................	77.00
1921..............	77.86		

For crops 1909 to 1929, inclusive, "Statistique Agricole Annuelle 1929," for crops 1930 to 1933 from "Journal Officiel" of September 10, 1933.

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D

FRANCE: Compulsory limitations on the use of domestic a/ and foreign wheats for milling purposes, 1929-1935

Period of time effective	Minimum domestic required	Maximum foreign permitted
	Percent	Percent
FOR BREAD FLOUR PRODUCTION		
December 5, 1929, to July 26, 1930....	97	3
July 27, 1930, to April 14, 1931......	90	10
April 15 to 17, 1931................	85	15
April 18 to 27, 1931................	80	20
April 28 to June 16, 1931............	75	25
June 17 to 30, 1931..................	70	30
July 1 to 3, 1931....................	75	25
July 4 to 9, 1931....................	80	20
July 10 to 24, 1931..................	85	15
July 25, to November 24, 1931.........	90	10
November 25, 1931, to January 30, 1932	97	3
January 31 to February 8, 1932........	90	10
February 9 to 12, 1932...............	85	15
February 13 to 24, 1932..............	80	20
February 25 to March 14, 1932.........	75	25
March 15 to 19, 1932.................	70	30
March 20 to 26, 1932.................	65	35
March 27 to April 1, 1932............	60	40
April 2 to May 7, 1932...............	55	45
May 8 to 24, 1932....................	60	40
May 25 to 27, 1932...................	55	45
May 28 to June 16, 1932..............	50	50
June 17 to 23, 1932..................	55	45
June 24 to 29, 1932..................	60	40
June 30 to July 9, 1932..............	65	35
July 10 to August 1, 1932............	75	25
August 2 and 3, 1932.................	85	15
August 4 to December 1, 1932..........	97	3
December 2, 1932, to April 15, 1933...	99	1
April 16, 1933.......................	100	0
FOR SEMOLINA PRODUCTION b/		
July 18, 1930, to July 14, 1931.......	70	30
July 15, 1931, to July 31, 1932.......	90	10
August 1, 1932.......................	97	3

Compiled in the Foreign Agricultural Service Division.

a/ Includes wheats from French colonies and to a limited extent wheats from French protectorates.

b/ Durum wheats chiefly used.

BREAD GRAIN PRODUCTION AND TRADE IN FRANCE, CONT'D

FRANCE: Compulsory limitation of flour extraction percentages

Decree of November 20, 1927:	Extraction percentage fixed at 1 kilo below the specific weight of grains. Example: Wheat of 78 kilograms specific weight - extraction percentage 77 percent.
Decree of December 5, 1928:	The provisions of the decree of November 20, 1927, relative to extraction percentages suspended.
Law of December 1, 1929:	Article 1, paragraph 3. The Minister of Agriculture is empowered to fix by decree the limits of extraction percentages for baking flour destined for domestic consumption.
Decree of September 27, 1932:	The extraction percentage for flour limited to a maximum of 66 percent.
Decree of December 11, 1932:	The preceding decree suspended.
Decree of September 6, 1933:	The maximum extraction percentage fixed at 11 kgs. below the specific weight of the wheat milled.
Decree of January 16, 1934:	The maximum extraction percentage fixed at 12 kilograms below the specific weight of the wheat milled.
Decree of April 28, 1934:	Until December 31, 1934, the maximum quantity of baking flour which the miller extracts from one quintal of wheat must not exceed the hectoliter weight of the aforementioned grain reduced by 14 kilograms, and must, in no case, surpass 65 kilograms.

Compiled by the Foreign Agricultural Service Division.

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